

# MassWildlife's Heritage Hub

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## Help Documentation

This document provides descriptions and screenshots of the functionality within the Heritage Hub application.

**Prepared by: Massachusetts Division of Fisheries and Wildlife**



MASSWILDLIFE

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## Terms of Use

In making observation reporting forms in this system available for use by the public, the NHESP does not authorize or condone the entry onto private property without the owner's knowledge and permission. The unlawful trespass onto private property may subject a trespasser to the criminal or civil sanctions available under the law. For these reasons, the NHESP strongly recommends that the permission of the landowner be obtained prior to entering private property to collect information for these forms. It is the sole responsibility of each person collecting information for these forms to ensure that their activities comply with the law.

**Please note: This is a living document; it will be updated as new features are released.**

## Internet Browsers

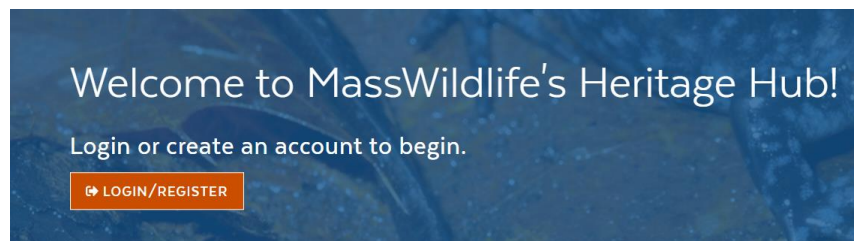
- Ensure you have the latest version of your web browser installed. Older versions may not support all system functionality.
- Internet Explorer is considered deprecated and therefore not a supported browser for this application.
- **Note:** The browser extension Grammarly has been identified as incompatible with the date fields in the system and causes the application to crash. Please be sure to turn off this extension when using Heritage Hub.
- **Tip:** Heritage Hub users are encouraged to regularly clear their browser cache (Ctrl + Shift + Del) and refresh their browser (Ctrl + R).

The Heritage Hub is mobile responsive and should work with most mobile devices. The system is not/does not have an app and therefore you must have an internet connection to access the system, save data, and submit reports.

Link to application: <https://eeaonline.eea.state.ma.us/dfg/nhesp/#/home>

## Creating an account

From the Heritage Hub homepage, click on the LOGIN/REGISTER button.



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You will be directed to the log in page where you can:

1. Log in with an existing account
2. Create an account
3. Request a password reset ([see Appendix C](#))
4. Activate your user profile
5. Update profile\*

\*See [Editing your Profile](#) below for more info

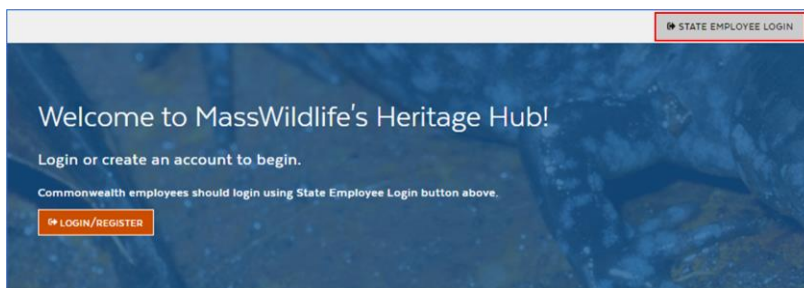
First time users should click on “Create an account”.

You will need to create a Username and Password and provide an email address. The system also asks for your first and last name and phone number. These are not required to create an account, however, **first and last name are required to use the system.** Therefore, we encourage you to enter them during account creation.

For more detailed instructions on creating an account, see [Appendix A: How to register for an account with MassWildlife's Heritage Hub](#).

### State Employees

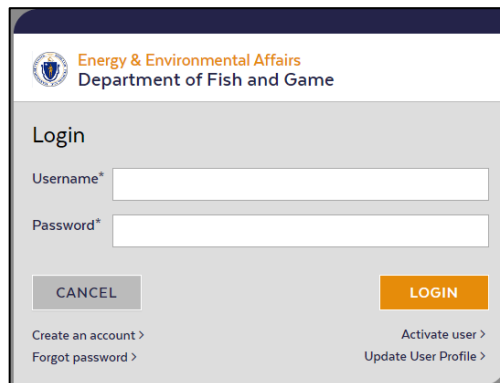
*If you are a state employee (e.g., have an @mass.gov or similar email address) contact the Heritage Hub administrator ([HeritageHub@mass.gov](mailto:HeritageHub@mass.gov)) to set up your account. Once your state account is associated with Heritage Hub, you can use the State Employee Login button to access the application and the credentials to log into your computer will be the same for this application.*



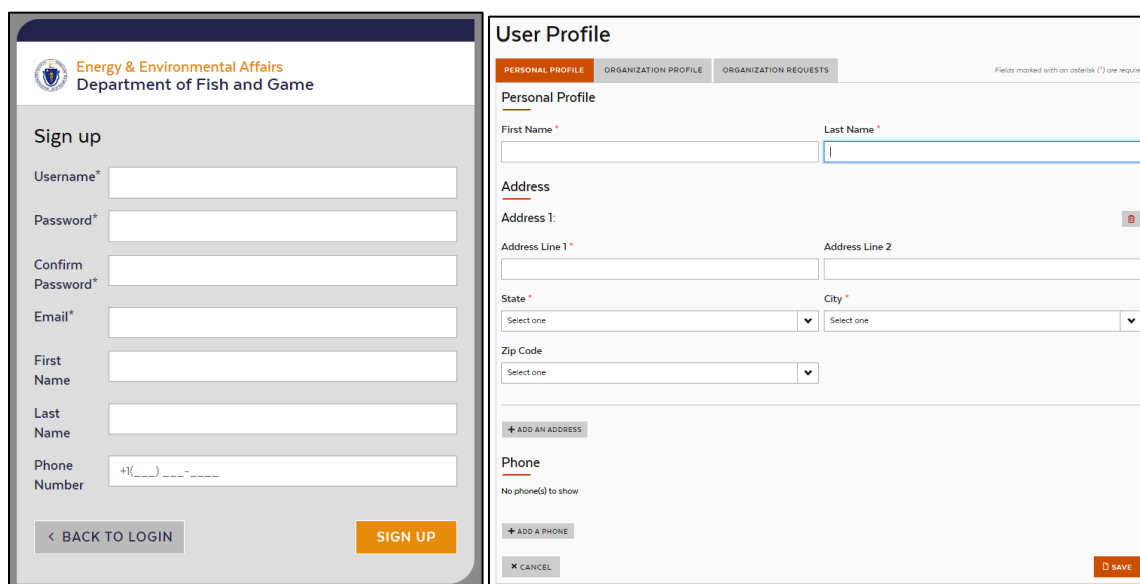
### Editing your Profile

Users have 2 profiles:

- (1) Your Energy & Environmental Affairs (EEA) profile required for account creation and includes your email address. This profile can be updated prior to logging into the Heritage Hub application.
- (2) Your application User Profile which you can update when logged into the system and captures your address, required information when submitting MESA forms.

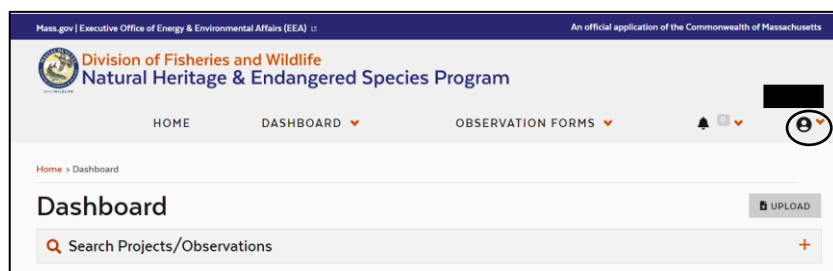


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Once you are logged in you can edit your application profile by clicking on the down arrow in the upper right corner.

The two options presented are “User Profile” or “Logout”. Click on User Profile to display and edit your personal information (Name, address, phone number). **A full profile, including First/Last Name and Address are required for all MESA forms.**



Please note that your account is linked to your email address. It may be necessary to create different accounts for personal or professional use. Please see Organization Profiles below for information on associating reporting with an organization.

## Organization Profiles

Users can request that an Organization Account be created. This functionality allows organizations and companies to create group accounts for their employees. **All forms created under an organization account belong to the organization and can be viewed and edited by the Organization's Administrator (Org Admin).** A request to create a new organization can be made from the User Profile page. Click on “Organization Requests” and then Join/Request New Organization.

The screenshot shows the 'User Profile' page with three tabs: 'PERSONAL PROFILE', 'ORGANIZATION PROFILE', and 'ORGANIZATION REQUESTS'. The 'ORGANIZATION REQUESTS' tab is active. Below the tabs, there's a section titled 'Organization Requests' with a button '+ JOIN/REQUEST NEW ORGANIZATION'. Underneath, there are two sections: 'Received Requests' with the text 'You haven't received any organization requests' and 'Sent Requests' with the text 'You haven't sent any request to join an organization'. A note at the top right says 'Fields marked with an asterisk (\*) are required'.

Users can search for an organization and request to join or request to create a new organization. All organization requests will be reviewed by the Heritage Hub Administrator for approval. Once an Organization has been created, the Organization Admin ('Org Admin') can send invitations to members. It is the Org Admin's responsibility to add and remove employees.

Being part of an Organization adds a radio button option to the top of your Dashboard. By default, you will be logged into your private account and you must choose "Organization" to see the Organization dashboard and any reports associated with that Organization.

The screenshot shows the 'Dashboard' page. At the top right is a 'BULK UPLOAD' button. Below the title, there are two sections: 'Choose a Submission Type' with radio buttons for 'Private' and 'Organization' (selected), and 'Choose an organization \*' with a dropdown menu showing 'Select one'. Below the dropdown, a red message says 'Organization is required'.

For more information on managing organization users see [Appendix C: How to add users to your Organization](#).

This set up allows Users to utilize a private email account to be associated with an Organization and have access to both Dashboards with one account. Alternatively, you may create 2 accounts if you have private observation forms you'd like to submit.

Once an employee has been removed from an Organization their reports will remain on the Organizations' dashboard but the former employee will no longer have access to these reports or to the Organization dashboard.

## Navigating the Application

### Dashboard

You have 2 dashboards available to you. The **Form/Observation Dashboard** contains a list of all your forms (Observation and/or MESA). You can save drafts here or monitor your form as it goes through the internal NHESP workflow. The **Effort Dashboard** contains a list of any "Efforts" you may have created. See [Efforts](#) below for more information.

Both dashboards include a search feature to help you search forms or efforts within your reporting history.

The screenshot shows the 'Dashboard' page with a search bar 'Search Projects/Observations' and a red circle around a '+' icon. Below the search bar is a section titled 'Projects/Observations List' with a table header. The table has columns: 'Form ID \*', 'Project/Site Name \*', 'Type \*', 'Target/Species', 'Town(s)', 'Status \*', and 'Actions'.

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**Note:** when searching for a report sometimes *less is more* (i.e., only enter known parameters as a mismatch of info will return zero results).

There are several **Actions** associated with each form.



**Edit** – this tool is available when forms are in “Draft” status or sent back to you for more information (“More Info Required”).



**Copy observation** – this is available on Observation forms and allows you to copy your form to a new one. For more information see **Copy Forms**.



**Delete** – This is only available on draft forms. Once a form is submitted it cannot be deleted.



**View Details** – This allows you to view a submitted form. There is also an option at the bottom of the review page to view a “Copy of Record”, this option allows you to print or save a PDF of the form.

The number next to the notification bell will update with new notifications. System notifications inform you when your form has been reviewed by NHESP staff, if more information is needed to help with the evaluation, or when our form review is completed.

In forms sent back for more information, the requested information is available within the form, for your convenience.

In addition to the User Profile information, the top banner of the application contains a link to this help document, your Dashboards, Observation Forms and MESA Forms. You can use these navigation dropdowns from anywhere in the application. Notifications are also accessed via the banner (the bell icon).

### Observation Forms

The Heritage Hub contains forms for reporting Animal, Plant, and Natural Community Observations as well as a Vernal Pool Certification Form. For more information on reporting, see [www.mass.gov/heritagehub](http://www.mass.gov/heritagehub). Help tips are also built into the forms to help you along the way.

All the required fields have been front loaded to the first 2 tabs of the form. You must fill out the required fields on the first page and save before navigating away from the form or it will be lost.

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Three navigation buttons are available to move through the tabs. "Save & Continue" moves you tab by tab through the form. The "Back" and "Save & Upload" buttons become available on the Map tab (2<sup>nd</sup> tab). "Back" allows you to move to previous tabs. The "Save & Upload" button bypasses subsequent tabs and brings you to the Upload tab.

The application brings you to the Upload tab each time to remind and encourage you to upload any photos or supporting documentation for your observation (e.g., reports, shapefiles, videos, etc.).



A horizontal navigation bar with a light grey background. On the left is a grey button with a left arrow and the text "BACK". On the right are two orange buttons, each with a document icon and the text "SAVE & CONTINUE" and "SAVE & UPLOAD" respectively.

## MESA Forms

The Heritage Hub contains forms for requesting rare species information and for filing for a MESA project review. The system also supports submitting electronic payments associated with each MESA form. For more information on MESA filings, see [www.mass.gov/heritagehub](http://www.mass.gov/heritagehub). Help tips are also built into the forms to help you along the way.

Two navigation buttons are available to move through the tabs. "Save & Continue" moves you tab by tab through the form. The "Back" button becomes available on the Map (2<sup>nd</sup>) tab and allows you to move to previous tabs.

The Fees tab on each form is where you will select the appropriate filing fee for your application. See [Fees](#) below for more information.

When starting a Project Review Checklist, users will be asked if the form is associated with a previously submitted Heritage Hub Information Request form. If yes, you can select the form and it will fill common fields for you. Filings submitted external to the system, or by different users cannot be linked.

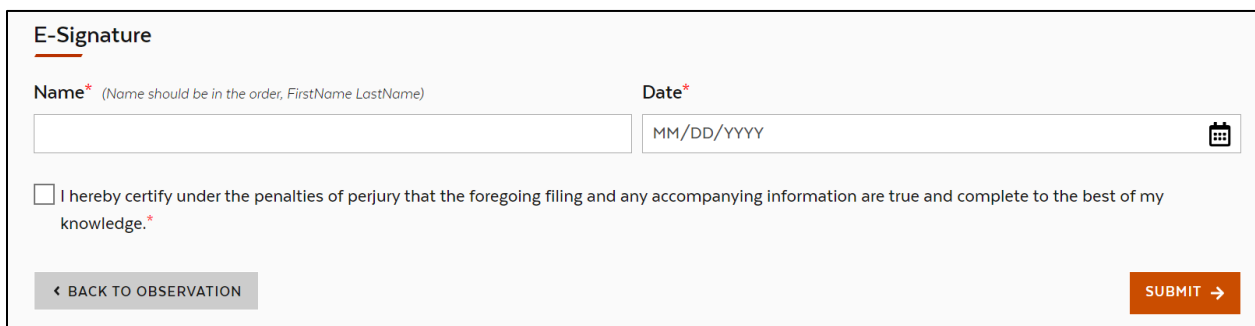
## Submitting Your Form

Once you have completed your form and, if needed, included any supporting files on the Documents or Upload tab, hit Save & Review.



An orange button with a document icon and the text "SAVE & REVIEW".

On the review page, the next step is to capture your electronic signature. "Name" must match the name on your profile and "Date" must be today's date.



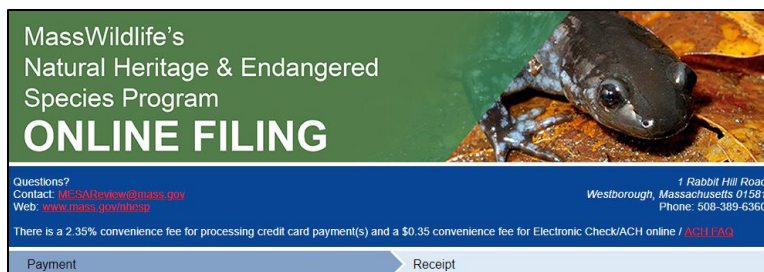
A form section titled "E-Signature" with a red underline. It contains two input fields: "Name\*" with a hint "(Name should be in the order, FirstName LastName)" and "Date\*" with a hint "MM/DD/YYYY" and a calendar icon. Below these is a checkbox with the text "I hereby certify under the penalties of perjury that the foregoing filing and any accompanying information are true and complete to the best of my knowledge.\*". At the bottom are two buttons: a grey "BACK TO OBSERVATION" button and an orange "SUBMIT" button with a right arrow.

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For Observation Forms you then click Submit and you are now complete. For MESA Forms requiring a fee, you will click Submit then be redirected to complete your electronic payment (if applicable). See [Electronic Payments](#) below for more info.

### Electronic Payments

For MESA forms requiring a payment, you will be redirected to a 3<sup>rd</sup> party site, nCourt. Fees can be paid with a flat rate electronic check (ACH) payment or via credit card payments for percentage of the required fee.



### Fees

Please visit [our website](#) for more information about the Massachusetts Endangered Species Act (MESA) Regulatory Review, how to file for a MESA project review, filing fees, exemptions from review, and more.

#### State and Federal Fees

If you are filing on behalf of a state or federal agency, please select "Yes" to that question on the Fee tab and select the appropriate category.

Please note, if your project meets a MESA Exemption (and still requires a filing), leave the selection as "No" and select the appropriate Exemption from the dropdown list.

A screenshot of the "FEES" tab in the MESA online filing system. The tab is highlighted in orange. Below the tab, there is a section titled "Fee". It contains a question "Are you filing on behalf of a state or federal agency?" with radio buttons for "Yes" and "No". To the right, there is a dropdown menu labeled "Please select a fee type\*". The dropdown is open, showing a list of options: "Internal Service Agreement - \$ 0", "Federal Exemption - \$ 0", "Internal Transfer: Simple MESA Review Filing (less than 5 acres of disturbance) - \$ 300", "Internal Transfer: Intermediate MESA Review Filing (5 to 20 acres of disturbance) - \$ 800", "Internal Transfer: Complex MESA Review Filing (More than 20 acres of disturbance or project requires wetlands variance) - \$ 4000", and "Internal Transfer: Linear MESA Review Filing (Projects greater than 1 mile in length) - \$ 4000".

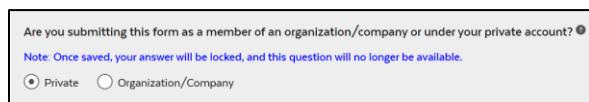
#### Submitting your Form (as part of an Organization)

Once you belong to an Organization, any forms you create can be associated with that organization which grants them access to the data in that report.

On the first tab of all forms, users can select Private (your own personal observation) or Organization/Company (if you want to share the report with an Organization). The option selected will be defaulted based on your Dashboard selection earlier but can be modified before proceeding through the form. Once this tab is saved this question will go away and thus cannot be changed.

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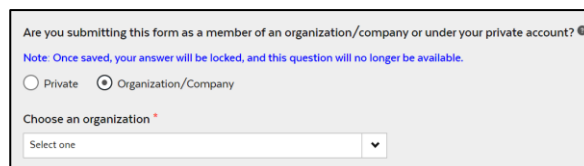
If you choose Organization/Company, you can then select which organization you want to share the report with. You can be a member of one or more Organizations; the dropdown will only include the Organizations for which you are an active member.



Are you submitting this form as a member of an organization/company or under your private account? ⓘ

Note: Once saved, your answer will be locked, and this question will no longer be available.

☒ Private ☐ Organization/Company



Are you submitting this form as a member of an organization/company or under your private account? ⓘ

Note: Once saved, your answer will be locked, and this question will no longer be available.

☐ Private ☒ Organization/Company

Choose an organization \*

Select one

Forms associated with a user's organization are accessible to that Org Admin. The Org Admin can view all forms associated with their organization, including drafts, and submit forms for users of their organization.

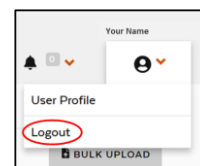
Forms cannot be re-assigned from an Organization to Private account or vice versa. Once you leave an organization, the organization remains in control of those forms.

See [Organization Profiles](#) for information on joining an Organization.

See [Appendix C](#) for information about adding users to your Organization.

## Ending your Session

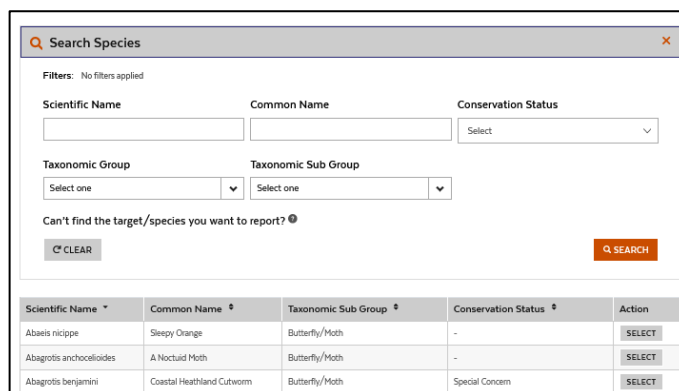
When you are ready to exit the Heritage Hub, it is recommended you **Logout** instead of just closing your browser. Closing your browser will exit the application but not actively end your session so the next time you login you may receive a message "Your session has expired" and you will need to enter your credentials twice to log in successfully.



## Species/Target Reporting

When completing Plant, Animal, or Natural Community forms the first question is to indicate what you are reporting by selecting a species/target.

The Heritage Hub offers a robust list of species/targets from which to choose your selection. You can enter search options to filter the list and find the species/target you want to report.



**Search Species**

Filters: No filters applied

Scientific Name:  Common Name:  Conservation Status:

Taxonomic Group:  Taxonomic Sub Group:

Can't find the target/species you want to report? ⓘ

Scientific Name *	Common Name *	Taxonomic Sub Group *	Conservation Status *	Action
Abais nicippe	Sleepy Orange	Butterfly/Moth	-	<input type="button" value="SELECT"/>
Abagrotis anchoceloides	A Noctuid Moth	Butterfly/Moth	-	<input type="button" value="SELECT"/>
Abagrotis benjamini	Coastal Heathland Cutworm	Butterfly/Moth	Special Concern	<input type="button" value="SELECT"/>

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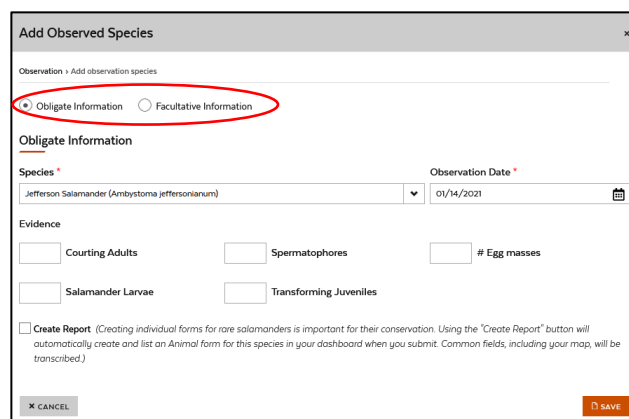
If you cannot find the species/target you wish to report, you can report the group to which it belongs, and our Biologist will update once an ID has been made. Group names can be entered into the Scientific Name field to search and include:

Plants	Fish	Sponge
Natural Community	Mammal	Flatworm
Ants/Bees/Wasps	Mussel	Segmented Worm
Anuran [frog]	Turtle	Moss Animal
Beetle	Salamander	Other Insect
Bird	Snail	Other Invertebrate
Butterfly/Moth	Snake	Animal Assemblage [e.g., bat hibernaculum]
Dragonfly/Damselfly	Crustacean	

When completing Vernal Pool forms, the species options are limited to Obligate and Facultative species, the associated biological evidence observed, and the date of those observations.


The window shown here can be completed for each unique species/date combination to be reported.

For MESA-listed salamanders, there is also an option to “Create Report”. Please see [Creating Animal Forms from a Vernal Pool Form](#) for more info.



## Reporting Negative Data

The observation forms can also be used to report negative data. After selecting your target, you can choose “No, reporting negative search” when answering “Species/Target Observed?”. This will truncate the form to only display question relevant to a negative search. You will still be prompted to map the site of your search and can provide survey-level detail, but many questions will be hidden.

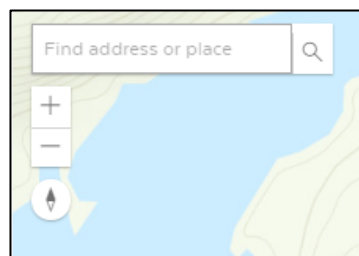


## Mapping


### Find a location


The “Find address or place” field can be used to search an address or enter latitude and longitude to zoom to a location. For Observation forms, when the map zooms to a location a point will automatically draw on the map. This point can be moved or deleted and replaced with a new feature (point, line, or polygon).

The +/- buttons can be used to zoom the map in and out. You can also click and hold on the map to drag or pan.



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 This tool allows you to view the map full screen.

 Click here to exit full screen view.

### Basemaps and Reference Layers

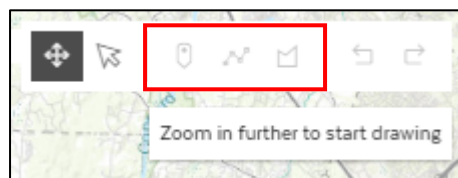
The map contains the following tools:

 This tool allows you to select a different basemap (e.g., topographic, ortho imagery, street, etc.).

 This tool allows you to turn on available reference layers (Town boundaries, Priority Habitat, Estimated Habitat, Potential Vernal Pools, etc.).

### Draw a point, line or polygon feature

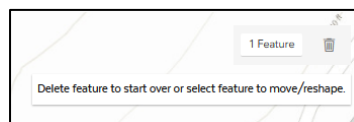
To enable editing tools, you must be zoomed in to at least the 1:600 ft scale. You can then select one of the tools provided to draw a point, line, or polygon, undo or redo edits. Double-click on the map to stop editing a feature.



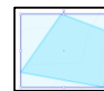
**Note:** Only one feature can be drawn per form. MESA forms only support polygon features, Vernal Pool forms only support point features. All other forms support either points, lines or polygons.

### Deleting, moving, or reshaping a feature

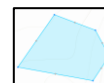
To **delete** a feature, select the feature then click the trash can icon. Only one feature can be mapped per report so you must delete an existing feature before drawing a new shape. To report multiple locations for observation forms, see [Copy Forms](#) below.



To **move** a feature, click on the feature to select (the blue box indicates a shape has been selected) then drag it across the map to a new location.



To **reshape** a feature, double-click the feature (line or polygon) then click and drag any vertices as desired.

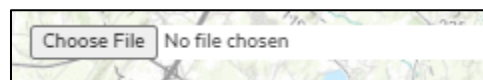


### Uploading a shapefile

The map allows you to upload a shapefile and use the shape as your location. The shapefile must contain **only the one feature (point, polyline or polygon)** you intend to use in the map.

First you must zip up all the pieces of your shapefile into a zip file. [See How to Zip a file](#). Your zipped file must include the following pieces: .dbf, .prj, .shp, .shx.

Once you have created your observation there is an option to choose or browse to a file to upload. Click on the button in the map and browse to your zipped folder.



The map will zoom to and display the shape from your file. Confirm the shape is correct and in the right location and click the "Save & Continue" or "Save & Upload" button.

## Copy Forms



The copy observation icon can be found in the Actions column of your dashboard. Any Observation form, in any state, may be copied to create a new form. After clicking the icon to copy a form, you will be directed to a new page which allows you to choose the type of form you would like to create and which fields you would like to copy.

If you belong to an organization, you will also be asked to select if you are copying to your private or organization account. This selection cannot be changed after the new form is created.

**Choose the type of copy**

☒ Copy as Plant
 ☐ Copy as Animal
 ☐ Copy as Natural Community
 ☐ Copy as Vernal Pool

Are you submitting this form as a member of an organization/company or under your private account? ⓘ

Note: Once saved, your answer will be locked, and this question will no longer be available.

☒ Private
 ☐ Organization/Company

When copying from one form type to another (i.e., plant form copied to an animal form), only fields that are on both forms will be available to copy. Simply check fields that you want to copy to the new form and click "Copy Observation" at the bottom of the page.

**Species Details \***

Question	Answer	
What are you reporting?		<input type="checkbox"/>
Species	Scientific Name: Abagrotis benjamini Common Name: Coastal Heathland Cutworm Conservation Status: Special Concern	<input type="checkbox"/>
Target Detected? *	Yes	<input checked="" type="checkbox"/>
Is this report associated with an effort?	No, I'm reporting a single observation	<input checked="" type="checkbox"/>
Effort Details	-	<input type="checkbox"/>

The new form will open, and any additional information can be entered. All fields and the map may be copied; however, any supporting files will need to be attached manually and the form will need an e-signature.

## Creating Animal forms from a Vernal Pool form

When filling out a vernal pool form there is an option to "Create Report" after selecting one of the MESA-listed salamanders. Creating individual forms for rare salamanders is important for their conservation. Using the "Create Report" button will automatically create and list an Animal form for this species in your dashboard when you submit. Common fields, including your map, will be transcribed.

If you check the box to create a report, once your vernal pool form has been submitted, a draft animal form for salamander selected will be created and available for editing on your dashboard.

If you found another species to report while at the vernal pool, you can copy your vernal pool form, with the copy observation feature, to expediate reporting.

### Efforts

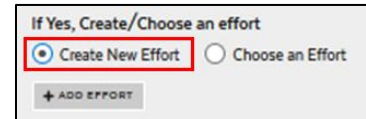
An Effort is our way of allowing you to group observations together. Creating an Effort is entirely optional. If you would like to group multiple observation reports together you can tag them to the same effort.

There are 2 ways to create an Effort in the Heritage Hub:

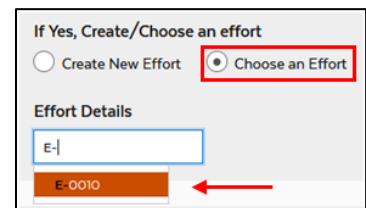
#### Create an Effort from within an observation form

All forms include the question “*Is this report associated with an effort?*”. By answering yes, you are prompted to then **Create a New Effort** or **Choose an Effort** [from one you already created].

If you select “**Create New Effort**”, you will click the “**Add Effort**” button, enter an Effort Name and optionally a description, then hit save and your new effort number will display on your form as shown.



If you select “**Choose an Effort**” a text box will appear to allow entry of an existing Effort Number.

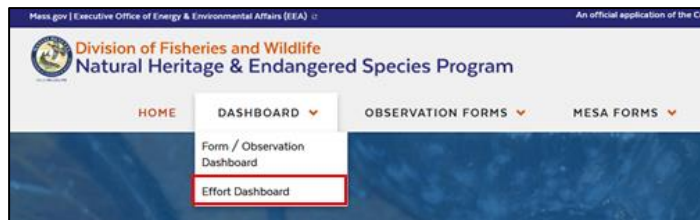


*Note the box will display existing Efforts you have created to help auto-complete your entry.*

#### Create an Effort from your Effort Dashboard

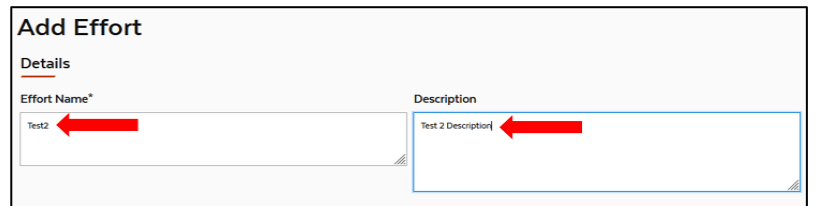
If you are including an Effort as part a bulk upload this is how you will get your Effort Number.

From any screen, navigate to your **Effort Dashboard** and click **+ Add An Effort**



Enter an **Effort Name** (required), a Description (optional), and click **Save**.

You will be redirected back to the Efforts Dashboard where your new Effort will be listed in the grid.



If bulk uploading data, enter the **Effort Number** into your bulk upload spreadsheet for records you which to associate with each other.

#### Editing an Effort, Linking Observations to an Effort

You can edit Efforts at any time by clicking the Effort Name (a hyperlink) on the Effort Dashboard.

Effort Name	Effort Number	Description
<a href="#">Example Effort</a>	E-0010	This is an example o

## MassWildlife's Heritage Hub

You can also link observations previously created, but not yet submitted, to an Effort using the **Link Observation** button.

Efforts Dashboard			+ ADD AN EFFORT
Search Efforts			+
Efforts List			
Effort Name	Effort Number	Description	
Test2	E-0009	Test 2 Description	
Test	E-0008	Test desc	

Last, you can link up to two efforts with each other by entering the Effort Number under the Linked Effort section.

### Edit Effort (E-0010)

Details

Effort Name\*

Example Effort

Description

This is an example of an effort.

Observations

Observation Number	Species	Action
P-0303	-	
A-0118	-	

+ LINK OBSERVATION

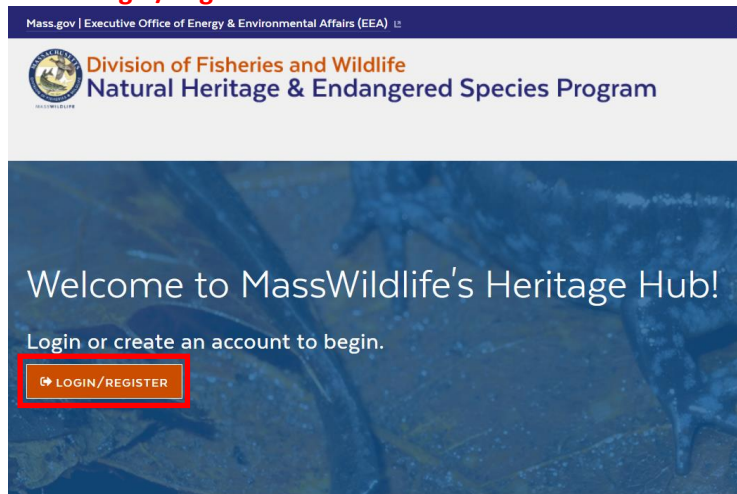
Linked Effort

Effort Number

## Appendix A: How to register for an account with MassWildlife's Heritage Hub

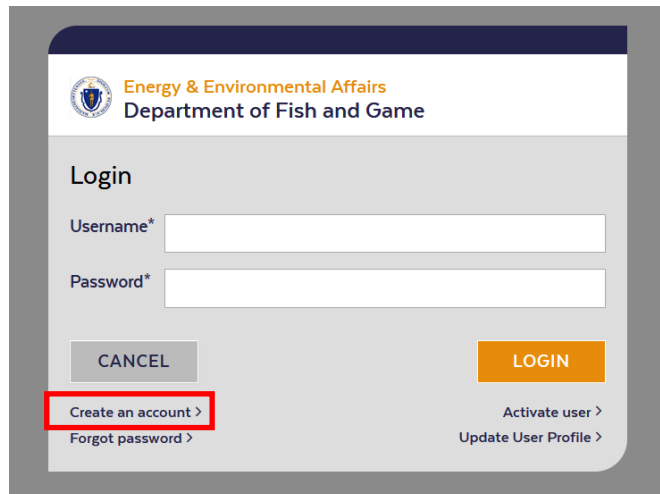
### Step 1

Click **Login/Register**



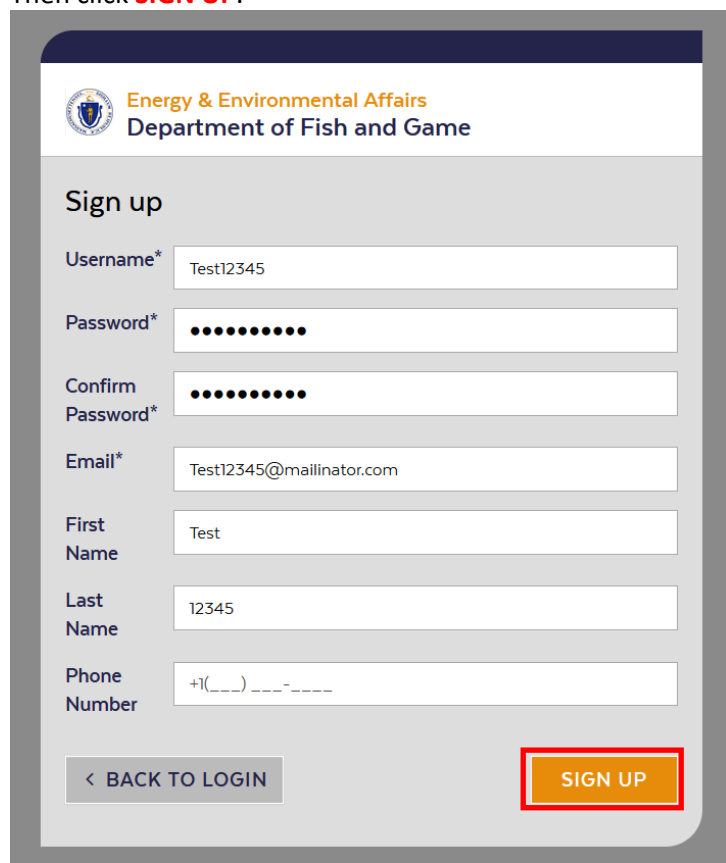
### Step 2

Click **Create an account >**



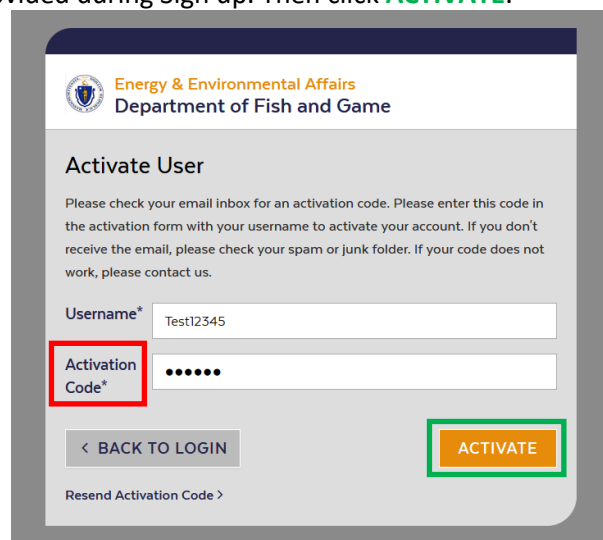
### Step 3

Complete the fields to create a new account.  
Then click **SIGN UP**.



### Step 4

Enter the **Activation Code** sent to the email address  
provided during Sign up. Then click **ACTIVATE**.



The email will come from:

***no-reply@verificationemail.com***

OR

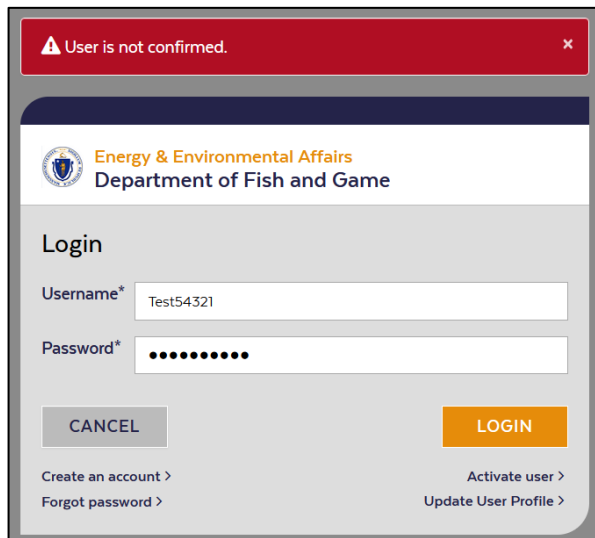
***EEA-DL-IT-Cloud-Operators@massmail.state.ma.us***

*You may need to check in your Spam folder.*

## Account Troubleshooting

### Troubleshooting: **USER IS NOT CONFIRMED**

If you do not activate your account as described in Step 4, when you enter your Username and Password on the Login page you will receive the following message:



The screenshot shows a login form for the Energy & Environmental Affairs Department of Fish and Game. At the top, a red error banner reads "User is not confirmed." with a close button. The login form includes fields for Username (containing "Test54321") and Password (masked with dots). Below the fields are "CANCEL" and "LOGIN" buttons. At the bottom, there are links for "Create an account >", "Forgot password >", "Activate user >", and "Update User Profile >".

### Troubleshooting: **Not authenticated OR Session has expired**

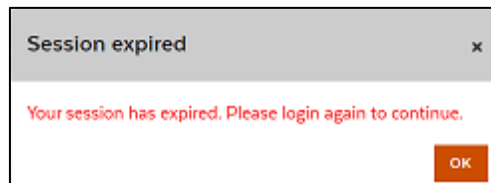
You may need to **clear their browser cache (Ctrl + Shift + Del)** and/or **refresh their browser (Ctrl + R)**. When clearing your cache, be sure to select All Time and not just the last hour or week.

After clearing your cache, enter your Username and Password again then click LOGIN.

If you are still not able to access the system, please contact us at [HeritageHub@mass.gov](mailto:HeritageHub@mass.gov).



The screenshot shows the dashboard of the Division of Fisheries and Wildlife, Natural Heritage & Endangered Species Program. At the top, there is a header with the program name and a "STATE EMPLOYEE LOGIN" button. In the center of the page, the text "Not authenticated" is displayed.

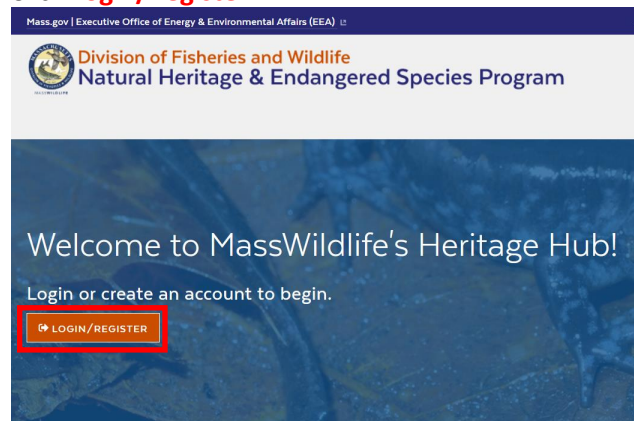


The screenshot shows a "Session expired" dialog box with a close button (X). The message inside reads: "Your session has expired. Please login again to continue." There is an "OK" button at the bottom right.

## Appendix B. Resetting your password

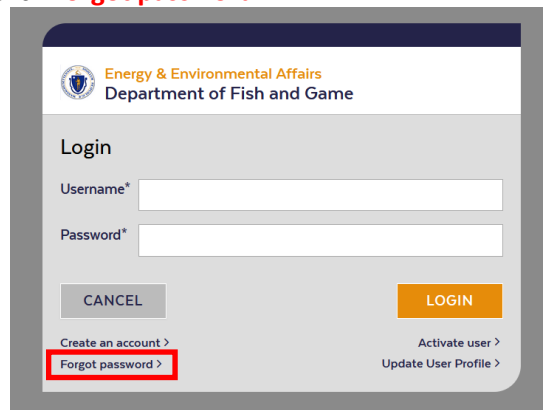
### Step 1

Click **Login/Register**



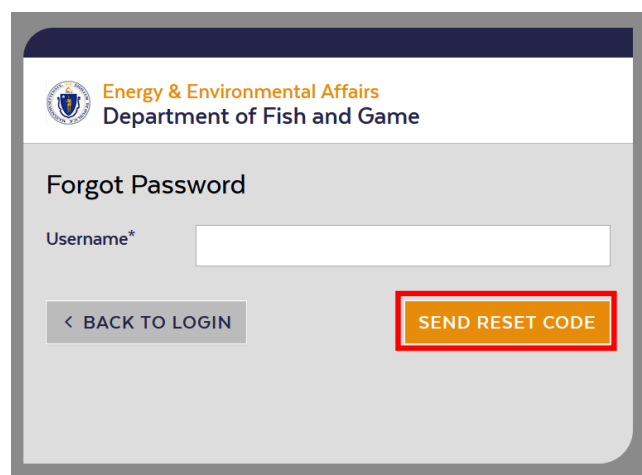
### Step 2

Click **Forgot password >**



### Step 3

Enter your Heritage Hub username then click **Send Reset Code**.



A verification code will be sent to the email address tied to your Heritage Hub account.

**The email will come from:**

[EEA-Apps-NoReply@mass.gov](mailto:EEA-Apps-NoReply@mass.gov)

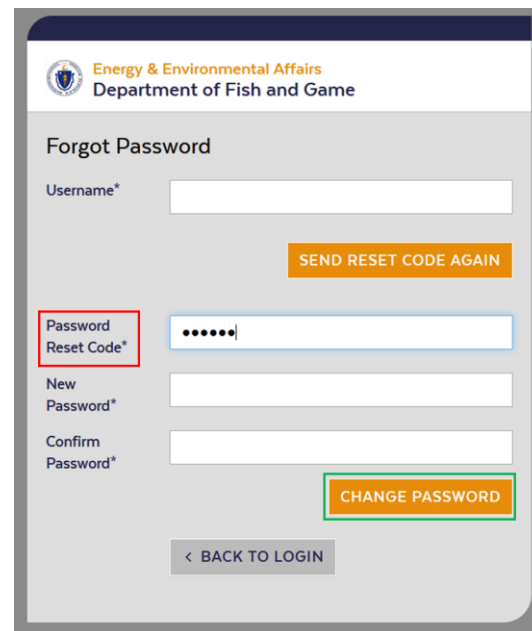
You need to check in your Junk or Spam folder.

### Step 4

Enter the **Verification Code** into the Password Reset Code field then enter your new password in the New/Confirm Password fields. Then click **Change Password**.

Your password must:

- Be at least 8 characters
- Include at least 1 uppercase letter
- Include at least 1 special character (e.g., @, #, \$)
- Include at least 1 number



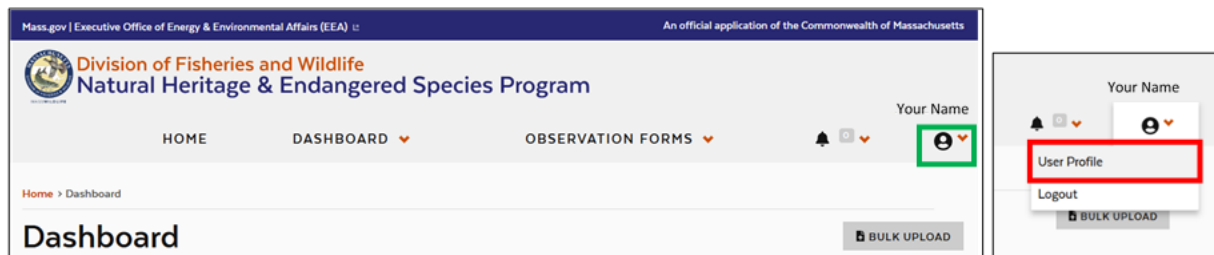
**Note:** The system will not warn you if you do not meet the above rules or if your New/Confirm passwords do not match.

When you click Change Password, if you have **successfully** met the rules below, the system will redirect you to the log in page from Step 2.

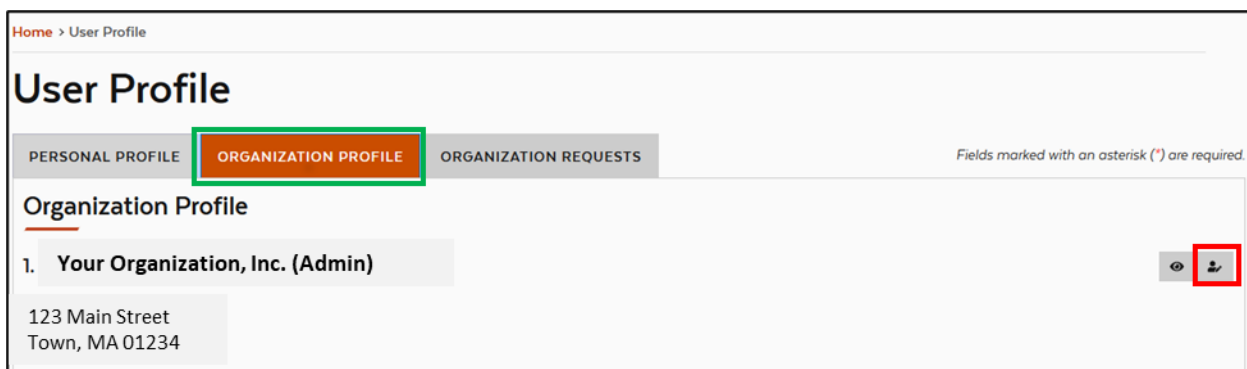
If you are **unsuccessful**, you will stay on the current page.

## Appendix C: How to add users to your Organization

Once you are logged into the Heritage Hub, click on the **dropdown** to access your **User Profile**.



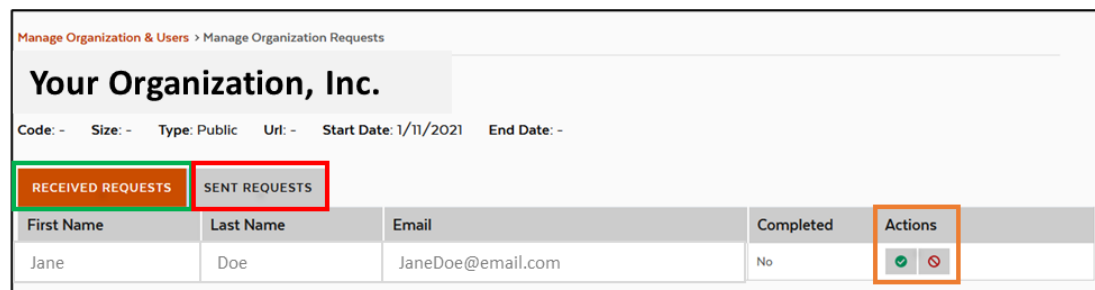
Select the tab for **Organization Profile**. Then click the Manage **Organization icon**.



Next, click the button for “**+ MANAGE NEW USER REQUESTS**”



You can now toggle between requests you have **received from users** and those which you have **sent to invite users** to join your organization.



You can either Accept  or Decline  requests using the appropriate buttons under Actions.

## Appendix D. Bulk Upload

The Heritage Hub application allows you to bulk create Plant, Animal, or Natural Community observation forms.

### Upload Templates

To successfully upload your observation reports, you must use one of the preformatted template spreadsheets, available at [www.mass.gov/HeritageHub](http://www.mass.gov/HeritageHub). There is a unique spreadsheet for each form type.

The system allows you to preview your data before upload but *does not* validate your uploads and, therefore, the spreadsheet templates include **(A) validated fields** to only allow accepted values for data entry. Further, each template has a tab which includes all the acceptable lookup values, where applicable, and all **(B) required fields** for submittal are displayed in red. Last, the column header includes **(C) help language** on correct data entry.

See [above](#) if you would like to associate multiple report in your bulk upload with an Effort.

ber	Towns	Site name	Directions	Latitude (DD)	Longitude (DD)	Exact Date
	Abington		Directions			
	Acton		Enter directions to the observation location.			
	Acushnet					
	Adams					
	Agawam					
	Alford					
	Amesbury					
	Amherst					

**Note:** Data validations are case sensitive so use of the lookup values provided is strongly recommended.

### How to Upload Reports

You can find the Bulk Upload button from your Observation Dashboard.



Select Observation then you can either click to the template saved on your computer or drag and drop the template file into the box displayed.

**Bulk Upload**

Select upload type \*

☒ Observation

Click or Drag and Drop File Here

Upload excel files only (Ex: HeritageHub\_Animal\_Observation.xls, HeritageHub\_Natural\_Community\_Observation.xls, HeritageHub\_Plant\_Observation.xlsm)

[← BACK TO DASHBOARD](#) [✕ CLEAR](#)

Once you have selected your template you can, click **Preview** to see the list of reports which will be uploaded, click the **trash can** and make new template selection, or click **Clear** to start over.

## MassWildlife's Heritage Hub

Name	Type	Size	Date	Actions
HeritageHub_Plant_Observation Upload Example	xlsm	88 KB	02/10/2021	

< BACK TO DASHBOARD
✕ CLEAR
PREVIEW

After the initial Preview selection, you can now click the Preview button next to any of forms and view the data as it will be loaded into the system or click Upload to proceed with your bulk upload.

Upload Preview	
Zostera marina (01/01/2020)	<span>PREVIEW</span>
Yucca filamentosa (02/02/2020)	<span>PREVIEW</span>
Xyris montana (03/03/2020)	<span>PREVIEW</span>
Woodsia glabella (04/04/2020)	<span>PREVIEW</span>
Vaccaria hispanica (05/05/2019 - 06/06/2019)	<span>PREVIEW</span>
Uvularia sessilifolia (07/07/2018 - 08/08/2018)	<span>PREVIEW</span>
Trifolium striatum (09/09/2017 - 10/10/2017)	<span>PREVIEW</span>

< BACK TO DASHBOARD
✕ CLEAR
UPLOAD

The system will notify you if your upload was successful or if there were problems encountered and you will be redirected back to your dashboard after you hit upload.

Note the system may display an error message and your upload may have partially completed. It is a good idea to check the forms on your dashboard before proceeding with another upload attempt.

Once your upload is complete, you can review and submit your draft forms.

Observation bulk upload is complete.

### Bulk Upload

Select upload type \*

☐ Observation

Upload type is required

< BACK TO DASHBOARD
✕ CLEAR

**Bulk Upload**

Something went wrong, please try again later or contact NHESP administrator at (508) 389-6300 or [HeritageHub@mass.gov](mailto:HeritageHub@mass.gov).

**Natural Heritage & Endangered Species Program**

[Heritage Hub Help Documentation](#)

Mary Poppins

HOME DASHBOARD ▾ OBSERVATION FORMS ▾ MESA FORMS ▾

Home > Dashboard

**Private Dashboard (User)**

BULK UPLOAD

## Bulk Upload Best Practices, Tips and Tricks

1. When bulk uploading reports be sure to always **start with a fresh template**.
2. **Red fields indicate a required field** to submit your form. You can upload without these values populated but you will not be able to submit your form until they are answered.
3. **Yellow fields indicate fields available when reporting negative data**.

## MassWildlife's Heritage Hub

4. **Use the built in look ups provided** on the second tab of each template. Values are case sensitive so and failure to use the specified values may result in an unsuccessful upload.
5. **Consider numbering your reports** (e.g., in the Site Name). In the event some reports fail to upload, this will help you quickly identify which reports successfully went through.
6. **Column headers include help language** and formatting to guide correct data entry.
7. If reporting Start and End times for a survey effort **use a 24-hour clock** as there is no way to indicated AM/PM (e.g., 13:00 vs 1:00).